

Finance and Administration Cabinet STANDARD PROCEDURE	PAGE: 1 OF 4
ISSUED BY: Office of Administrative Services, Division of Human Resources	
EFFECTIVE DATE: 8/22/05	
PROCEDURE # 2.18	
SUBJECT: Training Requests	
DISTRIBUTION CODE: A, B,C,D	CONTACT: <u>Train ng Liaison, Division of Human Resources (502) 564-7233</u>

I. PURPOSE

Training and development opportunities for Finance and Administration Cabinet (Cabinet) employees shall be driven by business needs and provide observable results. This procedure is being established to:

- create a consistent, efficient process for training request documentation and approvals for Cabinet employees,
- ensure that training and career development activities address the true business needs of the Cabinet, and
- provide documentation and recordkeeping of employee training activities in the state's Learning Management System.

II. DEFINITIONS

A. FORMAL TRAINING

Training is an event with specific date(s) and location(s) during which a topic related to the workplace is presented and for which the student's participation can be confirmed. The topic can be technical, behavioral or managerial. For example:

- classes presented by state agencies such as the Office of Government Training (OGT), Customer Resource Center, or the Personnel Cabinet,
- workshops, training sessions, or conferences conducted internally by the agency,
- vendor-provided workshops, classes, or conferences,
- information technology classes at post-secondary institutions, or
- classes for certification preparation.

B. LEARNING MANAGEMENT SYSTEM

Pathlore the web-based electronic system used by the Personnel Cabinet, shall be used to provide consolidated creation, registration, tracking and reporting of employee training activities. Designated training coordinators within the Cabinet will be responsible for maintaining accurate information in Pathlore.

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III. RESPONSIBILITIES

A. Finance and Administration Cabinet

The Cabinet will appoint a training liaison. The Cabinet training liaison, in the Office of Administrative Services, Division of Human Resources, shall:

- establish processes to ensure the capture of all training related information,
- serve as the liaison with the Office of Government Training (OGT),
- develop reports as requested by the Cabinet or its agencies, and
- manage Cabinet-wide training initiatives to meet Cabinet strategic needs.

Each agency within the Cabinet shall:

- approve training requests based on agency needs and funding availability,
- work with the Cabinet liaison to determine the approval process within their agency, and
- appoint a training coordinator for the agency to coordinate agency-specific training and enter training information into Pathlore.

IV. PROCESSES

A. Employee

An employee who initiates a training request shall:

1. complete the [Finance and Administration Cabinet Training Authorization Form \(TD01\)](#) (7. Forms – 2.18/a),
2. attach any necessary documentation as required by the TD01,
3. submit the form to the immediate supervisor, either manually or electronically, for approval, and
4. inform the training coordinator of the completion of vendor training.

B. Supervisor

A supervisor receiving a TD01 from an employee shall:

1. determine if the training is appropriate and if the employee may attend the class at the selected date and time,

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2. sign approved requests and forward the training request to the next approval level, or
3. return any request that is denied to the employee with a written explanation of the denial.

Supervisors may initiate training requests using the TD01 for individual employees or the [Cabinet Training Authorization Form TD02](#) (7.Forms – 2.18/b) for multiple employees.

C. Training Requiring Registration Charges

- All training requests which require that a registration fee be paid must have approvals from immediate supervisors and the agency head or designee. Each agency shall decide if any additional internal approvals are required.
- All approved training requests which require expenditure of funds must come to the Cabinet liaison or agency coordinator for tracking and entry into Pathlore.
- The employee or immediate supervisor will be responsible for registration, travel arrangements and forms, and submission of appropriate documentation for billing. All documentation for billing shall clearly identify training activities.
- The employee shall notify the Cabinet liaison or agency coordinator when the training is completed.

D. Training Which Does Not Require Registration Charges

- Training requests for OGT, MARS, the Personnel Cabinet, or training delivered by Cabinet personnel must have approval of the immediate supervisor. Agencies may also require additional approvals.
- All training requests shall be submitted to the Cabinet liaison or agency coordinator for registration.
- Completed training shall be verified in Pathlore by the agency providing the training.

E. Training Records

- All formal training events of an employee shall be recorded in the state's Learning Management System (LMS), Pathlore.
- The Cabinet liaison and designated agency training coordinators shall have access to the system for the purpose of registering students for classes and recording training activities.

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- The Cabinet liaison or designee shall be responsible for supplying requested reports or transcripts.

F. Travel Associated with Training

- Any travel costs associated with training should be estimated on the TD01 or TD02.
- All travel associated with training shall follow the state guidelines for training. This information can be obtained from the Office of the Controller.
<http://finance.ky.gov/internal/travel/>
- Reimbursement forms for travel can be obtained from the Office of the Controller or http://finance.ky.gov/internal/mars/forms_travel.htm.

V. FORMS

[Finance and Administration Cabinet Training Authorization Form](#) (TD01) (7.Forms–2.18/a)

[Cabinet Training Authorization Form TD02](#) (7.Forms – 2.18/b)

Travel Reimbursement forms http://finance.ky.gov/internal/mars/forms_travel.htm

NO STANDARD PROCEDURE MAY BE REVISED BY ADDENDUM, MEMORANDUM OR ANY OTHER MEANS OTHER THAN THOSE SET OUT IN STANDARD PROCEDURE #1.1 ENTITLED "CREATION, REVISION AND RESCISSION OF FINANCE AND ADMINISTRATION CABINET POLICIES AND PROCEDURES"

DISTRIBUTION CODES:

A. Senior Management
D. Cabinet Personnel

B. Division Directors
E. Division Personnel

C. Branch Managers/Supervisors
F. Branch Personnel
